



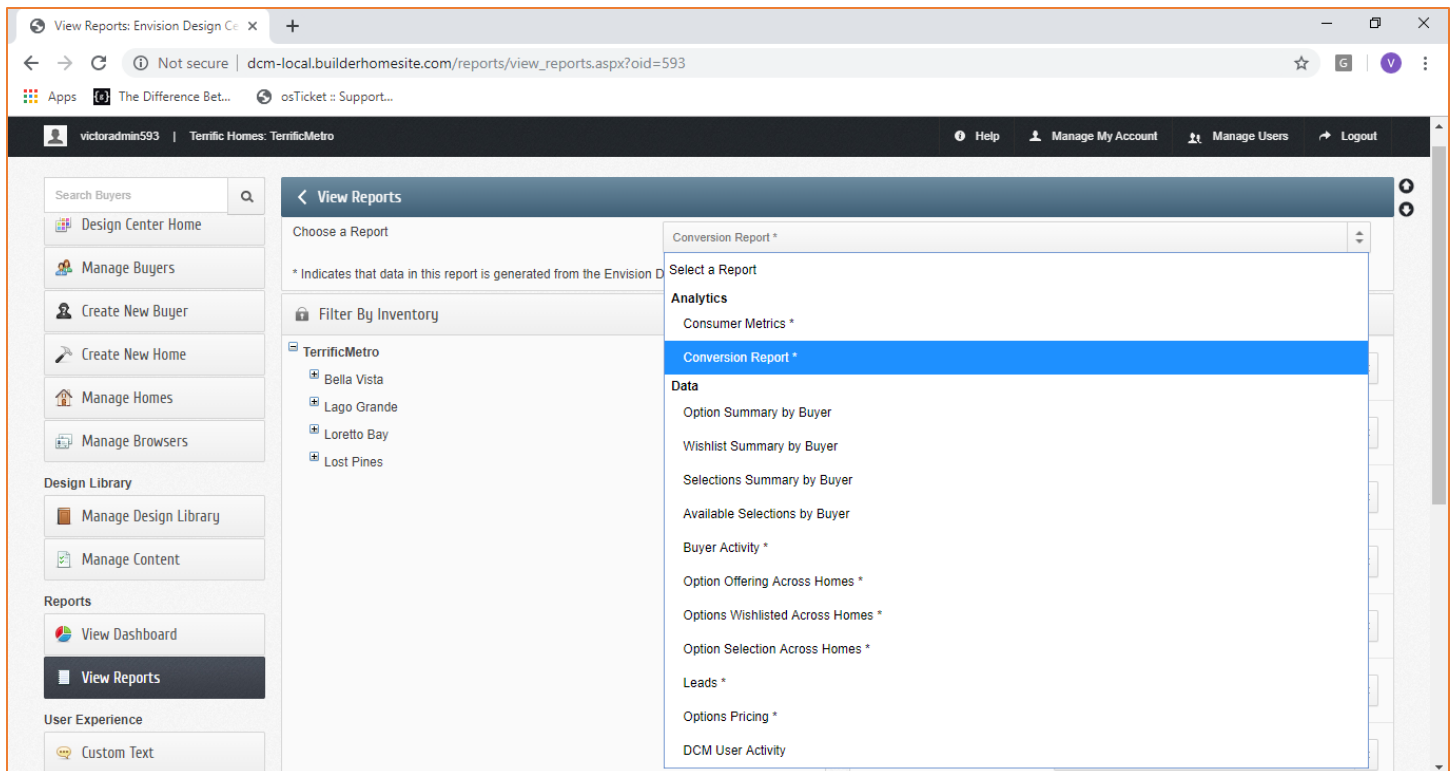
# Envision Feature in 4.18.0.0 – Builders

## DCM: Analytics Reports

DCM will now have 2 reports that provide more analytics than just raw data. These 2 reports are:

- Consumer Metrics: Assess the level of engagement your buyers have with Envision
- Conversion Report: See how well each of your options are converting from being viewed to being wishlisted to being selected.

### Analytics vs Data Reports



## Consumer Metrics

Learn how engaged your buyers are in their selection process via Envision. Data points include:

- Login Rates
- Wishlist usage
- Average Time on Site
- Average Upgrades
- Leads



1 of 38 Find | Next

Consumer Metrics Report generated: 10/21/2019 6:12 PM

NHTTestCorp  
NHTtestDivision2  
From 4/1/2018 To 3/31/2019

Year	Month	#Leads	#Lead Conversions	%Lead Conv	#Buyers Total	#Buyers Logged In	% Login Rates	# Avg Logins	With Wishlist	% Wishlist Usage	Avg Time on Site (mins)	# Avg Confirmed Options (0 logins)	\$ Avg Options Spend (0 logins)	# Avg Confirmed Options w/ Logins	\$ Avg Options Spend w/ Logins	\$ \$ Options Spend Increase	% Opt Spend Increase
NHTTestCorp: NHTTestRegion1: NHTTestDivision2																	
2018	4	0	0	0%	0	0	0%	0	0	0%	0	0	\$0.00	0	\$0.00	\$0.00	-
2018	5	0	0	0%	0	0	0%	0	0	0%	0	0	\$0.00	0	\$0.00	\$0.00	-
2018	6	0	0	0%	0	0	0%	0	0	0%	0	0	\$0.00	0	\$0.00	\$0.00	-
2018	7	0	0	0%	0	0	0%	0	0	0%	0	0	\$0.00	0	\$0.00	\$0.00	-
2018	8	0	0	0%	8	4	0%	4	0	0%	28	0	\$0.00	1	\$1,425.00	\$1,425.00	100%
2018	9	0	0	0%	0	0	0%	0	0	0%	0	0	\$0.00	0	\$0.00	\$0.00	-
2018	10	0	0	0%	9	7	0%	12	5	0%	125	4	\$1,648.00	3	\$12,030.00	\$10,382.00	600%
2018	11	0	0	0%	1	0	0%	0	1	-	0	5	\$3,179.00	0	\$0.00	(\$3,179.00)	-100%
2018	12	0	0	0%	0	0	0%	0	0	0%	0	0	\$0.00	0	\$0.00	\$0.00	-
2018	Year Totals	0	0	-	18	11	0%	1	6	0%	17	1	\$536.33	0	\$1,495.00	\$958.67	200%
2019	1	0	0	0%	6	3	0%	2	1	0%	2	0	\$80.00	1	\$609.00	\$529.00	700%
2019	2	0	0	0%	2	1	0%	2	1	100%	70	2	\$2,495.00	5	\$1,216.00	(\$1,279.00)	-100%

## Conversion Report

Learn which options and products are converting best with your buyers. Data points include:

- Options/Products Viewed vs.
- Options/Products Wishlisted vs.
- Options/Products Selected
- Options /Products most Selected

116 of 116 Find | Next

Total Homes: 180

	Offered	Viewed	% Conversion (Viewed to Wishlist)	Wishlisted	% Conversion (Wishlist to Selected)	Selected from Wishlist	% Selected from Wishlist	Total Selected
2671GroupingNoDes	3	0	-	1	0%	0	-	0
DOOR01	3	1	0%	0	-	0	0%	2
NormalMultiProd	49	2	100%	2	100%	2	100%	2
OptionF2533	29	2	150%	3	0%	0	-	0
Sky Light(12345)	2	0	-	0	-	0	-	0
renato fixed price	2	0	-	0	-	0	-	0
Windows(810)	80	6	50%	3	0%	0	0%	1
1.18.2	47	3	67%	2	0%	0	0%	1
344A	3	1	0%	0	-	0	-	0
344B	3	1	0%	0	-	0	-	0
344C	3	1	0%	0	-	0	-	0
344D	3	0	-	0	-	0	-	0
344E	3	0	-	0	-	0	-	0
344F	3	0	-	0	-	0	-	0
344G	3	0	-	0	-	0	-	0
344H	3	0	-	0	-	0	-	0
M Option	3	0	-	0	-	0	-	0
Milgard Window	3	0	-	0	-	0	-	0
WIN01	3	0	-	1	0%	0	-	0

Note: The data in this report is generated from the Envision Data Warehouse and is refreshed nightly.



## DCM: Allow Copy of 'any' Presales wishlist - for shared options

This feature allows you to copy any pre-sales wishlist to a buyer regardless of what plan the wishlist was created on. It will match the options that are available on that plan and copy those over to the buyer wishlist.

★ Presale Accounts for Home				
First Name	Last Name	Date Submitted Range		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Contact		Date Submitted	Plan	Wishlist
<input type="radio"/> Nicole Lellis nellis@builderhomesite.com 111 austin, TX 78717		7/9/2007	1B - WOODBURY GLEN	1
<input type="radio"/> Nicole Lellis nellis@builderhomesite.com 111 austin, TX 78717		10/13/2017	Plan 2 Room View 867	2
<input type="radio"/> renato MIRANDA faka_inck12@newhomesource.com				

## OM: Extend Brand Column on "Link Product to Options" screen

On the link products screen in OM, we have added the Manufacturer name to differentiate when Brands have the same name in two different manufacturers:

2. Find Product(s) to Add

Product Category Group

Cabinetry and Storage

Product Category

Countertops

Brand

All Envision Brands

Product No./Model/SKU/GTIN/Name/Style

Search

×

Clear

Enter \* for to match any characters (wildcard)

	Brand	Product No.	Product Name	Style
<input type="checkbox"/>	Arizona Tile	Vegas	Vegas Quartz by Arizona Tile	Vegas
<input type="checkbox"/>	Arizona Tile	Victoria	Victoria Quartz by Arizona Tile	Victoria
<input type="checkbox"/>	Arizona Tile	White Sand	White Sand Quartz by Arizona Tile	White Sand
<input type="checkbox"/>	Granite	100-01	Absolute Black	Absolute Black
<input type="checkbox"/>	Granite	100-03	Baltic Brown	Baltic Brown

3. Update Linked Products

Flooring: Laminate

Normal Tile 1 Normal Tile 1

☐ Update Type

Type:

☐ Normal  
(Include all)

☐ Group  
(Choose one)

☐ Lock type from automated-feed changes

PRI	Product/Style
<input type="radio"/>	Amana by Maytag ABB1924DEB [ABB1924DEB] Amana® 19 cu. ft. Bottom Mount Refrigerator(Black)
<input type="radio"/>	Amana by Maytag ABB1924DES [ABB1924DES] Amana® 19 cu. ft. Bottom Mount Refrigerator(Stainless Steel)
<input type="radio"/>	Amana by Maytag ABB1921DEW [ABB1921DEW]

## Platform Updates

- OM Differential: Don't inactivate rooms that are setup for visualizers
- DCM: Optimize Wishlist for builder using rooms and has option price lock turned on
- Visualizer re-design bug fixes
- Platform Bug fixes



# What's next?

## OM: Ability to automatically assign options to all lower inventory

Currently Envision requires that options be explicitly assigned at the lowest level of inventory which allows those options to be priced individually per plan. The use case for this change is that there are many options that a community may offer at the same price for every plan. This feature will allow the ability to assign options at the community level which will then auto-assign to all lower level inventory at that same price.

## EDC Rooms-ReDesign

### Category View

The screenshot displays the Beacon Hill Country Builders website interface. The header features the company logo and a navigation bar. The main content area shows a grid of four categories: Structural (4 items, \$57,000.00), Flooring (4 items, \$350.00), Plumbing (1 item, \$0.00), and Lighting & Fans (2 items, \$150.00). A sidebar on the left contains navigation links: Home, Design Choices for Roma with Rooms, Dashboard, Wishlist, and Finished Selections. The top right corner shows a welcome message and a total price of \$57,500.00.

BEACON HILL COUNTRY BUILDERS

Welcome back, Classic

Bella Vista: Roma with Rooms

Show by: **Category** Room

Wishlist : Wishlist (default)

Total: \$57,500.00

Add items to your Wishlist to highlight the design choices you would like to see installed in your new Valencia Home. You can then print your Wishlist ahead of time, or your Valencia Design Consultant can access it during your appointment to help you make your final selections. Whether it be luxurious travertine, sparkling bath fixtures or luscious landscaping, we have selections guaranteed to enhance your lifestyle!

Category	Items	Price
Structural	4 Items	\$57,000.00
Flooring	4 Items	\$350.00
Plumbing	1 Items	\$0.00
Lighting & Fans	2 Items	\$150.00

### Room View

The screenshot displays the Beacon Hill Country Builders website interface. The header features the company logo and a navigation bar. The main content area shows a grid of three rooms: Secondary Bathroom (4 items, \$75.00), Master Bathroom (1 item, \$75.00), and Whole House (6 items, \$57,350.00). A sidebar on the left contains navigation links: Home, Design Choices for Roma with Rooms, Dashboard, Wishlist, and Finished Selections. The top right corner shows a welcome message and a total price of \$57,500.00.

BEACON HILL COUNTRY BUILDERS

Welcome back, Classic

Bella Vista: Roma with Rooms

Show by: **Category** Room

Wishlist : Wishlist (default)

Total: \$57,500.00

Add items to your Wishlist to highlight the design choices you would like to see installed in your new Valencia Home. You can then print your Wishlist ahead of time, or your Valencia Design Consultant can access it during your appointment to help you make your final selections. Whether it be luxurious travertine, sparkling bath fixtures or luscious landscaping, we have selections guaranteed to enhance your lifestyle!

Room	Items	Price
Secondary Bathroom	4 Items	\$75.00
Master Bathroom	1 Items	\$75.00
Whole House	6 Items	\$57,350.00



View Rooms the Option is available in on the Option Tile

BEACON  
HILL COUNTRY BUILDERS

Welcome back, Classic

Bella Vista: Roma with Rooms

Wishlist : test toggle ✕

Total: \$1,222.45

Add items to your Wishlist to highlight the design choices you would like to see installed in your new Valencia Home. You can then print your Wishlist ahead of time, or your Valencia Design Consultant can access it during your appointment to help you make your final selections. Whether it be luxurious travertine, sparkling bath fixtures or luscious landscaping, we have selections guaranteed to enhance your lifestyle!

Plumbing

Item Gallery

Forté®

Qty: 1, \$82.45

Vestige

Qty: 3  
\$75.00 - \$155.00

Vestige

Qty: 2  
\$150.00 - \$155.00

Toilet 1

Qty: 2, Included

Vestige

Item No. TM9001001

Select Room:

Quantity

☒ Half Bathroom  
with a long name  
to see what  
happe

\$75.00

1

♥

☒ Master Bathroom

\$155.00

1

✓

☐ Secondard  
Bathroom

\$150.00

1

♥

[Collapse Rooms](#)

[Add to Wishlist](#)

View Rooms the Option is available in on the Product Description Page

BEACON  
HILL COUNTRY BUILDERS

Welcome back, Classic

Vestige

Item No. TM9001001

Upgrade Price: \$75.00

Vestige, Oil rubbed bronze two-handle high arc  
bathroom faucet

Product No.  
6301ORB By Moen

Style/Color: Oil Rubbed Bronze

MOEN

test toggle

Quantity: 3 - \$225.00

Notes:

More Choices Available

Select Room:

Quantity

☒ Room Name 1

\$1,000.00

10

♥

☐ Room Name 2

\$12,000.00

30

✓

☐ Room Name 3

\$3,000.00

150

♥

☐ Room Name 4

\$15,000.00

10

✓

☐ Room Name 5

\$1,000.00

105

♥

[Collapse Rooms](#)

[Add to Wishlist](#)